



The Equitable Bank cashes in on PhantomPDF *Business*

Foxit PhantomPDF *Business* saves valuable time

In his 24 years with The Equitable Bank, Mike Block, Vice President, Information Security Officer and Information Technology Officer, has seen technology transform the industry. But one thing hasn't changed—the amount of paperwork the bank generates.

While most of it may be online now, bank employees still need to share documents with each other—and just as importantly, with bank regulators and auditors. Being able to edit PDFs saves critical time in an industry competing on customer service.

Prior to using Foxit PhantomPDF *Business*, Block was annotating PDF documents within Acrobat Reader. He was frustrated with the software's comment function, which he used to note that he had reviewed a document, and felt it was a clunky way to keep track of information needed for bank auditors.

"The final straw for me happened when Acrobat Reader lost my toolbox after an update," Block explains. "I decided to look for a new solution that could do the job I needed it to do."

Robust capabilities are a pleasant surprise

After reading about PhantomPDF *Business* online, Block realized the PDF editor not only offered the functionality he needed, it included features he didn't even know were available. He quickly signed up to for a trial.

Skeptical after trying other PDF editors, Block was impressed with Foxit from the get-go, particularly with how intuitive and easy to use the solution is.

A PDF solution that won't break the bank

Founded more than 90 years ago, The Equitable Bank is a premier residential real estate lender in Milwaukee. With six branches and 115 employees, it's a full-service bank that prides itself on serving the community instead of stockholders.

Being able to edit and share security reports, training documents and marketing materials quickly and easily is a priority for employees of the financial institution. And with cyber threats lurking—and bank auditors questioning security procedures—keeping files safe is mandatory. With Foxit PhantomPDF *Business*, the bank found just what it needed to remain competitive with larger banks, without having to make a major investment in software.

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foxit CASE STUDY

“With Foxit PhantomPDF *Business*, it was amazing,” says Block. “I never needed to call the help desk. I simply looked up how to do things like add text in the solution’s help menu.”

Block’s colleague, Heidi Gumz, Director of Talent Development, agrees with his assessment. “I appreciate all of the videos, the help and the micro learning that’s available right within the context of the software,” she says.

Even better, Foxit streamlined what had been a cumbersome process, eliminating the need to create separate spreadsheets to keep track of pertinent information for bank examiners. “As soon as I get a report in my inbox, I just open it in PhantomPDF *Business*, review it, add in my remarks, file the document in its proper folder and I’m done,” says Block. “It has been an amazing step forward.”

“With PhantomPDF, we get a tremendous value for the cost.
I have to tell you, it’s worth every penny.”

Streamlining and saving time

Before Foxit, employees would have to ask the bank’s graphic designer to do things like update branch worksheets or stitch together survey data into a more legible format for them.

“Now, when we have to do something like make a regulatory change to our website, we don’t have to find the original documents,” explains Gumz. “We can just go right in and make the changes ourselves.”

Gumz has been so pleased with the Foxit PhantomPDF *Business* that she plans to recommend it to her Financial Institution Employee Learning and Development Roundtable, a group of financial trainers in southeastern Wisconsin. “I know many other community banks that could benefit from using Foxit,” says Gumz. “And you can be sure I’ll be telling them to check the solution out.”

A great value for the money

As the person who manages software for the bank, Block has seen his share of high-priced software, but Foxit was different. “For a bank, a lot of times you’re used to being taken to the cleaners on software,” explains Block. “But with Foxit, the pricing is very reasonable.”

That meant Block’s presentation to bank executives went smoothly and they quickly approved five PhantomPDF *Business* licenses.

“With Foxit PhantomPDF *Business*, we get a tremendous value for the cost,” Block explains. “I have to tell you, it’s worth every single penny we paid.”



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